

Targeting and Triage...**Identifying Business Customer Accounts by Level and Status**

	<u>Current Accounts</u>	<u>Acquisition Accounts</u>	<u>Dormant Accounts</u>
Premier <u>In the boxes to the right, list your customers (by business name), sorted by level and customer status</u>	<u>Box A</u>	Box B	Box C
Intermediate	Box D	Box E	Box F
Basic	Box G	Box H	Box I

Targeting and Triage...

Identifying Objectives by Level and Status

	Current Accounts	Acquisition Accounts	Dormant Accounts
<u>Premier</u>	Box A In this box are two types of customers: those that you want to grow (more services/job orders), and those that are to be “maintained.” In both cases, you want to keep these customers current and active .	Box B Based on your targeting strategy, goals and identifying businesses, this box contains the names of those businesses that you want as new customers. These will be acquired based on your outreach strategy .	Box C This box contains the names of business accounts that you have not had contact with (and therefore have not used any service) in more than 12 mos. (but less than 24 mos.) The objective here is to re-contact, assess the cause of “dormancy” and reactivate if appropriate .
Intermediate	Box D These are current “intermediate” customers, and the goal is to keep them as customers .	Box E (Same as box B, only less intensive outreach.)	Box F (Same as box C, only less intensive re-contacting and follow up.)
Basic	Box G The goal for current basic customers is to maintain this status, with minimal effort.	Box H There may not be an outreach strategy for new basic customers, however, customers in this group may call you for services.	Box I There is not an aggressive strategy in this box, but at a minimum, a check in is required to determine if dormancy is due to dissatisfaction, and if so to correct the problem.

Targeting and Triage...

Establishing investments of your time...

	Current Accounts	Acquisition Accounts	Dormant Accounts
Premier <i>In the boxes, indicate your current assessment of time spent, and needed to meet goals.</i>	Box A # of customers _____ Current time: _____ Time needed: _____ <input type="checkbox"/> Increase <input type="checkbox"/> Decrease	Box B # of customers _____ Current time: _____ Time needed: _____ <input type="checkbox"/> Increase <input type="checkbox"/> Decrease	Box C # of customers _____ Current time: _____ Time needed: _____ <input type="checkbox"/> Increase <input type="checkbox"/> Decrease
Intermediate	Box D # of customers _____ Current time: _____ Time needed: _____ <input type="checkbox"/> Increase <input type="checkbox"/> Decrease	Box E # of customers _____ Current time: _____ Time needed: _____ <input type="checkbox"/> Increase <input type="checkbox"/> Decrease	Box F # of customers _____ Current time: _____ Time needed: _____ <input type="checkbox"/> Increase <input type="checkbox"/> Decrease
Basic	Box G # of customers _____ Current time: _____ Time needed: _____ <input type="checkbox"/> Increase <input type="checkbox"/> Decrease	Box H # of customers _____ Current time: _____ Time needed: _____ <input type="checkbox"/> Increase <input type="checkbox"/> Decrease	Box I # of customers _____ Current time: _____ Time needed: _____ <input type="checkbox"/> Increase <input type="checkbox"/> Decrease

List the customer groups where time spent needs to be **increased**:

List the customer groups where time spent needs to be **decreased**